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Japan Resumes Some Poultry Imports

In 2003, Japan banned Chinese poultry for three months due to Avian Influenza. Japan only allowed imports of cooked product from approved plants in China. To cover the resulting shortage, Japan imported more poultry from Thailand and drew down on relatively high domestic frozen stocks.

Japanese Monthly Ending Poultry Stock Estimates in MT

	2001	2002	2003	2004
Jan	117,872	119,548	127,442	94,163
June	113,096	139,560	97,187	87,201
Dec	100,051	117,723	95,736	n/a

In 2004 widespread outbreaks of Avian Influenza in Asia resulted in bans of poultry from multiple countries. All poultry imports from China and Thailand were banned in January, 2004. Later, Japan negotiated a permit system on a plant-by-plant basis with China and Thailand to resume trade in cooked poultry products.

Japanese Total Broiler Imports Including Prepared Products

Top Five Countries

	2002 Jan-Jun	2003 Jan-Jun	2004 Jan-Jun	% change 04/03
Brazil	95,539	72,426	131,701	85%
China	121,055	109,432	46,116	-58%
Thailand	136,390	117,985	41,553	-65%
U.S.	21,725	20,407	5,171	-75%
Malaysia	212	172	1,772	930%

Japan banned U.S. poultry in February, but partially lifted the ban in March. Taiwan was banned in January, the ban was lifted on August 30, 2004, and imports resumed in October. Japan is Taiwan's largest market for poultry products. South Korea has been free of AI for eight months and is attempting to revive exports to Japan.

Thailand and China have been unable to stem the spread of AI, and new cases have occurred in Malaysia and Indonesia.

Source: OIE, FAS, MAFF, news wires

Japan Imports: Frozen Broilers (in MT)

	U.S.	China	Brazil	Thailand	Total
2003					
May	3,124	6,770	13,443	12,338	35,675
June	2,264	52	14,128	14,191	30,635
YTD	19,279	45,905	72,339	81,036	218,55
2004					
May	245	108	29,120	8	29,481
June	245	174	22,468	31	22,918
YTD	5,067	7,875	131,473	12,238	156,653

Source: ALIC

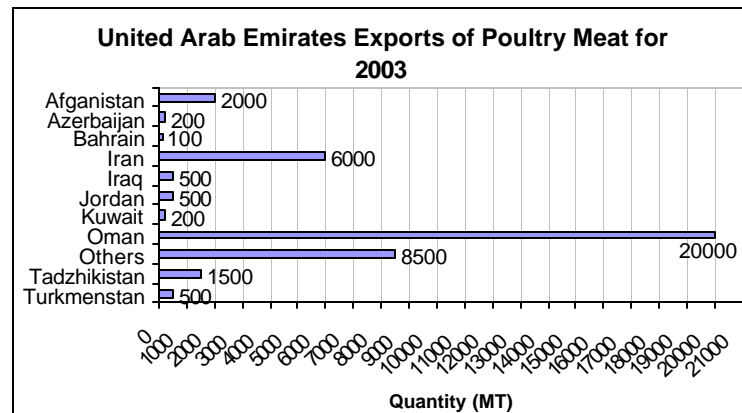
United Arab Emirates

Egg production has grown from 256.3 million eggs in 1997 to 322.0 million eggs in 2002. Chicken meat production was fairly stable, from 28,017 metric tons in 1997 to 28,586 metric tons in 2002. Estimates for 2004 are about 35,000 metric tons. The UAE produces about 17 percent of the national demand for poultry and 39 percent for eggs.

Poultry consumption in the UAE is rising due to an increase in local populations, health and safety concerns with red meat (cholesterol, BSE, FMD), prices which are competitive with fish and red meats, expansion in the HRI sector, and an increase in tourism. Poultry imports have grown at a brisk pace to meet those needs and for re-export to Iraq, Iran and Afghanistan. Re-exports to Afghanistan are mostly leg quarters.

Brazil's market share is 64 percent compared to the U.S. share, which is 15 percent. Poultry imports from the U.S. are mostly chicken leg quarters. Some major EU poultry producers have set up production facilities in Brazil to produce their brand at the lower cost and thus compete with other Brazilian producers.

Importers usually maintain limited stocks, to avoid unnecessary costs such as storage and to avoid pressure resulting from price changes in both the local and international markets.



UAE Poultry Imports (Metric Tons)

	2002	2003	2004*
Brazil	78,297	107,911	125,000
Denmark	17,237	15,645	15,000
France	17,782	10,036	11,000
Saudi Arabia	4,530	3,515	5,000
Thailand	1,095	1,942	2,500
U.S.	14,484	25,183	15,000
Other	2,517	3,573	8,500
Total	135,942	167,805	182,000

*Estimate

Source: USDA FAS, UAE Government Statistics

Inspected Egg Products-U.S. & Canada Export/Import Trade**U.S. Exports to Canada, in Pounds (000) (Preliminary)**

Week Ending October 02, 2004		Year-To-Date		
TYPE	2004	2003 1/	2004 2/	2003
Liquid	278	450	12,575	12,764
Frozen	0	0	11	96
Dried	56	42	548	430
Total	334	492	13,134	13,290

U.S. Imports From Canada, in Pounds (000) (Preliminary)

Week Ending October 02, 2004		Year-To-Date		
TYPE	2004	2003 1/	2004 2/	2003
Liquid	98	116	6,883	4,445
Frozen	40	127	1,368	2,809
Dried	0	40	1,853	983
Total	138	283	10,104	8,237

Inspected Shell Eggs**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

Week Ending October 02, 2004		Year-To-Date		
TYPE	2004	2003 1/	2004 2/	2003
Jumbo	0	14	378	353
Extra Large	4,130	240	148,454	21,257
Large	8,700	4,760	301,599	89,056
Medium	2,076	810	99,198	47,817
Ungraded	6,696	10,880	242,442	137,510
Misc	0	0	16,790	13,442
Total	21,602	16,704	808,861	309,435

1/ Comparable Week, to-date figures may not total due to rounding.

2/ Includes revisions to previous week (s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Source: USDA/AMS Poultry Programs, Market News Branch.

LIVE POULTRY SLTRD UNDER INSPECTION W/E 02-Oct-04
(PRELIMINARY)**U.S. FOWL SLAUGHTERED DOMESTICALLY**

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
Head	1,416	1,573	2,989
Last Week	1,523	1,316	2,839
Same week yr ago	1,346	1,444	2,790
To-date/2004	53,304	52,490	105,794
To-date/2003	57,874	54,975	112,849

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
Head	410	0	410
Last Week	256	0	256
Same week yr ago	266	0	266
To-date/2004	9,456	91	9,547
To-date/2003	9,376	133	9,509

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
Head	1,826	1,573	3,399
Last Week	1,779	1,316	3,095
Same week yr ago	1,612	1,444	3,056
To-date/2004	62,760	52,581	115,341
To-date/2003	67,250	55,108	122,358

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

			Oct 8, 2004
<u>CHICKEN</u>	PRICES	VOLUME	
	(Cents per Pound)		

FAT	FROZEN	FRESH	TOTAL	EXPORT
CONTENT				
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

PRICES				
VOLUME				
(Cents per Pound)				

FAT	FROZEN	FRESH	TOTAL	EXPORT
CONTENT				
15% OR LESS				
RANGE	22.00	19.00	101,200	-
WTD AVERAGE	22.00	19.00		
15-20%				
RANGE	13.75-22.00	11.00-18.00	2,165,600	963,200
WTD AVERAGE	16.49	13.89		
20% OR MORE				
RANGE	-	14.50	122,400	-
WTD AVERAGE		14.50		

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

		Oct 8, 2004	
<u>CHICKEN</u>			
— PRICES —		VOLUME —	
(Cents per Pound)			

FAT	FROZEN	FRESH	TOTAL	EXPORT
CONTENT				
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

PRICES				
VOLUME				
(Cents per Pound)				

FAT	FROZEN	FRESH	TOTAL	EXPORT
CONTENT				
15% OR LESS				
RANGE	16.50-18.50	20.00-22.00	1,816,000	1,256,000
WTD AVERAGE	17.26	21.00		
15-20%				
RANGE	15.50-20.00	17.00-19.00	3,110,000	2,470,000
WTD AVERAGE	17.58	18.19		
20% OR MORE				
RANGE	-	17.50	280,000	280,000
WTD AVERAGE		17.50		

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 08 OCTOBER 2004.

The trade sentiment on fresh tom breast meat was mostly steady, fresh destrapped tenderloins steady to fully steady, balance of fresh white meat steady to instances firm. Frozen white meat trade sentiment was steady to instances firm. Fresh white meat demand ranged from slow to fair on tom breast meat to instances good on trims. Frozen white meat inquiry moderate. A few processors noted a slowing further processed demand. Offerings of fresh tom breast meat ranged light to adequate, fresh destrapped tenderloins spotty, balance of fresh white meat limited at best. Frozen tom breast meat and destrapped tenderloin supplies were held with confidence with destrapped tenderloins held in the strongest hands, balance of frozen white meat offerings tight. Trading fair on frozen mechanically separated turkey (MST) for export, balance slow. For domestic (fresh): body chopping skin 12, scapula 111-112 cents delivered. For export: fresh MST 18, fresh tom drums 42, frozen destrapped tenderloins 161 cents delivered.

FRIDAY, OCTOBER 08, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS		W	44.00	80	43.36	280
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS		R	28.00	40	28.00	40
MECHANICALLY SEPARATED 2/	19.00-21.00		19.71	224	20.51	584
THIGH MEAT - FROZEN		R	81.75	80	82.40	422

THURSDAY, OCTOBER 07, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		W	44.00	80
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS	28.00		28.00	40
MECHANICALLY SEPARATED 2/	21.00		21.00	120
THIGH MEAT - FROZEN	81.50-82.00		81.75	80

WEDNESDAY, OCTOBER 06, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	44.00		44.00	80
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	25.50	208
MECHANICALLY SEPARATED 2/	21.00		21.00	80
THIGH MEAT - FROZEN		T	82.62	302

TUESDAY, OCTOBER 05, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		M	43.10	200
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	25.50	208
MECHANICALLY SEPARATED 2/	21.00		21.00	160
THIGH MEAT - FROZEN	80.00-84.00		82.62	302

MONDAY, OCTOBER 04, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	42.50-44.00		43.10	200
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	25.50	208
MECHANICALLY SEPARATED 2/		F	19.50	160
THIGH MEAT - FROZEN	82.00		82.00	40

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.